Office of Information Technology Services

Project Portfolio Management Tool

Hints and Tips

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1 Document History

1. Revision History

Revision #	Revision Date	Description of Change	Author
1.0	8/10/2005	Initial Document	J. Tulenko
1.1	8/24/2005	Various additions	J. Tulenko
1.2	11/23/2005	Clarified Cost Data Section Table contents, Document History same page	C. Richards
1.3	1/10/2006	Miscellaneous additions	J. Tulenko
1.5	3/24/2006	Added section about document management tab	C. Richards
1.6	3/28/2006	Updated Info About Status Reporting and Gate Review/Approval	C. Richards

2 Purpose

This document has been created to assist users of the Project Portfolio Management tool with various hints and tips on how to use the tool.

These hints and tips are a collection of suggestions on how to use the tool based on feedback from users on areas in the tool where they tended to misunderstand how to use the tool for certain tasks.

As users report additional issues with the tool, this document will be enhanced to explain common problems with the tool and how to overcome them.

3 PPM Tool Hints and Tips

3.1 Hints and Tips for using the PPM Tool

Initial Tool Use

- Only Internet Explorer is supported as a browser (Netscape, Mozilla, Firefox, etc are not supported)

- If you are typing in the web address of the tool (https://www.ppm.state.nc.us), don't forget the "s" in "https".

- For optimal viewing, your screen settings should be set to 1024 X 768.

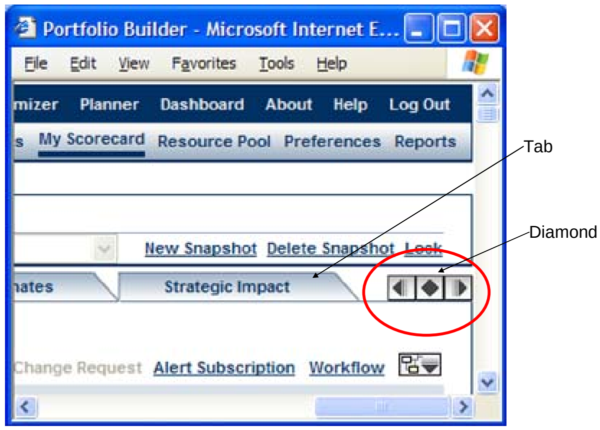
- If the tabs across the top of the page (when viewing a project) wrap to the second line, then you need to adjust your screen settings. Specifically, go to the "Display Properties" in Windows (right click on Windows Desktop and select "Properties"), select the "Settings" tab, click on the "Advanced" button and check for "DPI Setting" of "Large" (should be changed to "Normal").

General Navigation

- As mentioned in the training class, do not use "back" button on I.E. – you risk losing data and possibly having your session go to an unstable state.

- If the screen is still processing (I.E. icon moving in the upper right corner of the browser page), please be patient and wait until the function has completed its operation (I.E., "update"). If you start clicking around during an operation, unexpected results may occur.

- In general, the “cancel” button at the bottom of most of the tabs takes you completely out of the project (to move between tabs, use the tabs at the top of the page or use the “diamond” near the top, right-hand side of the screen).



- On several tabs, the same word is used on multiple buttons on a screen. Be careful to press the correct one (for example, when viewing an issue or risk, there are two “close” buttons – the bottom one closes the project and takes you back to the builder screen, the one above that closes that issue.

- Be sure to press “Update” if you have made changes to a tab before moving off it, just to be sure the change is in the tool (though the tool does automatically update when you change tabs). If you are in edit mode and are not sure if you made any changes, but did not mean to, press the “cancel” or “close” button at the bottom of the screen, go out of the project and back into it.

- Just like any Windows or Internet Explorer (I.E.) application, if you click on a field that has multiple choices, and scroll your mouse wheel up or down, the choices in that field scroll up and down, which can be a great feature. However, if you have highlighted a value in the field and scroll your mouse wheel to change the value in that field, make sure that you “deselect” the field before you use the scroll wheel to scroll to the bottom of the page or you may inadvertently change the value in that field.

  If you are in edit mode for a project and inadvertently change a field, and you then change from one tab to another, the tool will update the project with the changes you made on that tab (whether they were intentional or inadvertent).

  Bottom line is to be careful – if you are only viewing a project, then use “view” mode and you can’t make an inadvertent change. If you are in edit mode, be careful of what you change on a tab before moving on to another tab (you can always press “cancel” at the bottom if you aren’t sure if you made any changes to a tab, then go back into a project).

- If you click on the "date picker" (calendar) icon available on several of the tabs and the calendar window does not pop up, then most likely you previously had the calendar window up and it is hidden behind the main PPM tool window – find it by minimizing any other windows that you have open, close the calendar window and then go back to the PPM tool window and try it again.

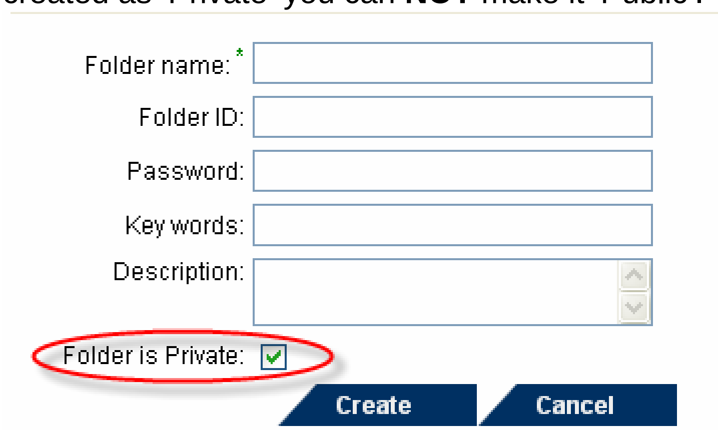
- The maximum number of characters in the text fields is approximately 3,800. Anything beyond that will be truncated.

Project Info Tab

- If you change the "Project Range" in the Project Info tab, you will send your project back to the Initiation Phase (the workflow that a project follows is directly related to the "Project Range")

Document Management Tab

- When creating a new folder the default setting is to create the folder as 'Private'. If the folder is created as 'Private' only the user who created the folder will be able to see it when they go into the Document Management tab. Once a folder is created as 'Private' you can **NOT** make it 'Public'.



- To create a 'Public' folder make sure that you uncheck the box at the bottom left of the create folder window, where it says 'Folder is Private'. The default setting is for the folder to be 'Private'.

Cost Data

- In training, many people experienced the problem of trying to enter data into the benefit cost matrix, where the row and column headers scrolled off the screen and made it difficult to determine the correct cell to enter data at level 4. With the latest update of the PPM tool the row headers have been fixed on the screen. The latest update has added another helpful function. If you hover over a cell with the mouse pointer a text box will appear telling you which column you are in.

- Another way to get around the problem of the column headers disappearing is to "collapse" the level 3 rows for all the level 3 rows except the one you are working with. This way the column headings stay on the screen and you can determine where you are in the matrix. To "collapse" a level 3 row (after "drilling down" to level 4), simply click on the "-" (minus sign) next to the level 3 row that you want to collapse, and the level 4 items that are under that level 3 row will be hidden from view (to expand the level 3 row back and see the level 4 items under it, simply click on the "+" (plus sign) next to the level 3 row).

- When the PPM Tool refers to 'Annual Cost', it is referring to fiscal year costs (July 1 → June 30). So Annual Costs for 2006 are for the time period of July 1, 2005 to June 30, 2006.

Project Approvals

- As a contributor, before you sign off on your project to move it forward in the workflow for approval, make sure you do not have any red fields in the workflow window. If you do, the project will not move forward to the approvers until values are added for these fields. The exception to this is if there are multiple contributors and one of the other contributors is responsible for those fields.

- Whether an agency or statewide approver is approving or rejecting a project, they still "signoff" on the project from the workflow window. This will bring up another window that let's them choose whether this signoff is an approval or a rejection.

- Agency and statewide approvers can sign off on a project (to reject or approve) in "view" mode or "edit" mode.

- Since project data is frozen during the approval process, project status reporting can **NOT** be **initiated** while the project is in the gate review and approval process. The two processes can **NOT** occur at the same time. If it is close to status reporting time, status reports should be done before moving the project into the gate review and approval process.

Snapshots

- The snapshot feature of the tool only preserves the information in certain tabs (specifically, the Budget Cost tab, Status tab and Cost Tracking tab). If you use View mode and look at a previous month's snapshot, or run a status report from a previous month, you will see a mixture of the data from that month in the Status and Cost Tracking tab with the current data on the other tabs.